



# INTERNATIONAL EGG AND POULTRY REVIEW

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U. S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

## U.S. Agricultural Outlook Forum 2001

Broiler meat exports in 2000 increased 13 percent to a record 5.5 billion pounds. Exports showed a marked recovery in recent months as exports to Russia in 2000 almost doubled the previous year's level. Food aid shipments early in 2000 started the increase, and commercial exports to Russia began to take off in mid year. Low parts prices have made U.S. broiler meat an attractive buy for Mexico and China/Hong Kong, where exports were about 22 and 13 percent higher to each market. In 2001, broiler exports are forecast to increase about 3 percent to 5.7 billion pounds, another record year. Oil revenues for both Russia and Mexico should allow them to keep buying poultry, and with prices remaining attractive, China/Hong Kong will remain strong markets for U.S. broiler meat exports.

Turkey exports recovered most of the ground lost in 1999, rising 21 percent to a projected 458 million pounds. Shipments to Mexico in 2000, the largest market for U.S. turkey exports, increased about 14 percent. There was also a substantial gain to Russia, where exports, while not yet recovering to pre-crisis levels, rebounded to about four times the 1999 level. Total turkey exports in 2001 are forecast to rise 3-4 percent, and will be driven primarily by shipments to Mexico. Any further increase in exports to Russia will likely be tempered by the policy change in 2000 that increased the turkey tariff and lowered the broiler tariff.

Source: USDA/Economic Research Service

## EU Consumers Eat Less Beef

The EU has experienced increased detection of BSE and outbreaks of foot and mouth disease (FMD). EU beef production is forecast to decline nearly 7 percent in 2001 and beef consumption is forecast to fall 15 percent. Poultry consumption is forecast to rise three percent and pork consumption up one percent. Beef exports for 2001 are forecast to fall 37 percent from two years ago as an increasing number of countries restrict the import of meat, animals and animal products from the EU.

Source: USDA/Foreign Agricultural Service

## SPS Committee Tackles BSE, Foot and Mouth Disease

The BSE (mad cow disease) crisis and the outbreak of foot and mouth disease (FMD) ranked high on the agenda of the WTO Committee on Sanitary and Phytosanitary Measures (SPS) that met on 14-15 March. Members furthermore addressed 'equivalence' and developing countries' participation in international standard setting bodies. The Committee agreed that 'equivalence' does not necessarily require formal equivalence agreements, but can be achieved at different levels. Equivalence is addressed in Article 4 of the SPS Agreement, which requires Members to accept differing SPS measures of other Members as equivalent if they provide the appropriate level of protection.

Bridges Weekly Trade News Digest

## World Food Outlook - Meat and Meat Products

Continued slow growth in meat supplies is likely to characterize the world meat market in 2001, with global meat production expected to expand to 237.4 million tons, up by 2 percent. The output gains are likely to be concentrated in pigmeat and poultry meat sectors in North America as well as in middle-income developing countries in Asia and South America. A recovery in the beef sector will be hampered by progressive herd rebuilding and consumer concerns regarding BSE. Considerable uncertainty clouds the outlook for the EC meat sector as beef consumption drops, intervention stocks increase and prospects for cattle slaughter in 2001 hinge on testing results of the cattle aged over 30 months. Late-year price shifts in favor of pigmeat and poultry should serve to boost output in these sectors.

## World Meat Exports 1/

	1999	2000	2001 forecast
	(. . . thousand tons . . .)		
<b>WORLD</b>	<b>16,744</b>	<b>16,978</b>	<b>17,138</b>
Poultry meat 2/	7,009	7,213	7,364
Pig meat	3,304	3,227	3,275
Bovine meat	5,483	5,498	5,442
Sheep and goat meat	695	775	790
Other meat	252	266	266

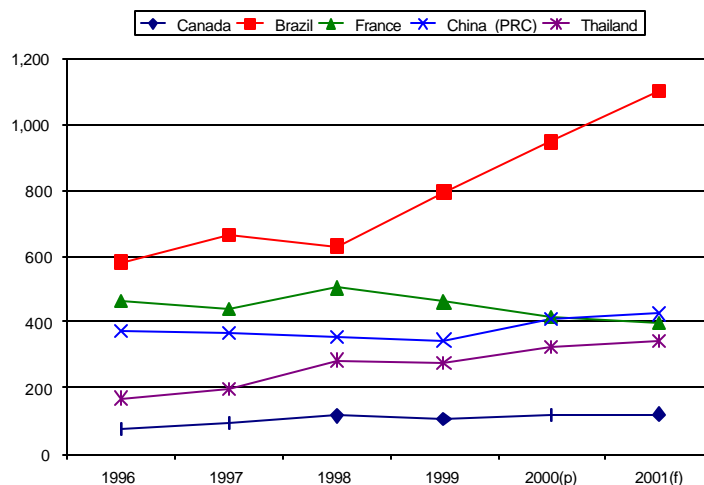
Note: Total computed from unrounded data.

1/ Includes meat (fresh, chilled, frozen prepared and canned) in carcass weight equivalent; excludes live animals, offals and EC intra-trade.

2/ Includes transshipments from China, Hong Kong SAR and the Baltics.

Source: FAO

## Poultry Meat Exports of Selected Countries 1,000 Metric Ton Ready to Cook Equivalent



P-Preliminary, F- Forecast

Source: USDA/Foreign Agricultural Service

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**Inspected Egg Products-U.S. & Canada Export/Import Trade**  
**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending Mar 17, 2001	Year-To-Date			
	2001	2000 /1	2001	2000
Liquid	309	142	2,011	1,453
Frozen	0	0	0	40
Dried	0	0	22	58
Total	309	142	2,033	1,551

**U.S. Imports From Canada, in Pounds (000) (Preliminary)**

Week Ending Mar 17, 2001	Year-To-Date			
	2001	2000/1	2001	2000
Liquid	13	58	1,097	1,186
Frozen	9	12	300	109
Dried	0	0	143	321
Total	22	70	1,540	1,616

**Inspected Shell Eggs**
**U.S Exports To Canada, in 30-Dozen Cases (Preliminary)**

Week Ending Mar 17, 2001	Year-To-Date			
	2001	2000 /1	2001	2000
Jumbo	15	53	87	145
Extra Large	330	1,290	2,726	5,033
Large	2,328	3,944	20,209	26,827
Medium	1,020	150	7,638	6,987
Ungraded	7,622	4,530	25,766	12,960
Misc	2,350	750	5,537	2,250
Total	13,665	10,717	61,963	54,202

/1 Comparable Week, to-date figures may not total due to rounding.

Source: USDA/AMS Poultry Programs, Market News Branch in cooperation with Agriculture Canada, Pltry Development Div.

**LIVE POULTRY SLTRD UNDER INSPECTION** W/E 17-Mar-01  
**(PRELIMINARY) U.S. FOWL SLAUGHTERED DOMESTICALLY**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,841	1,318	3,159
LAST WEEK	2,010	1,270	3,280
SAME WEEK YR AGO	1,971	1,448	3,419
TO-DATE/2001	20,328	13,970	34,298
TO-DATE/2000	22,335	14,972	37,307

**U.S. FOWL SLAUGHTERED IN CANADA**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	670	10	680
LAST WEEK	571	4	575
SAME WEEK YR AGO	539	12	551
TO-DATE/2001	6,067	66	6,133
TO-DATE/2000	5,947	39	5,986

SOURCE: AGRICULTURE CANADA, PLTRY DEVELOPMENT DIV.

**TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	2,511	1,328	3,839
LAST WEEK	2,581	1,274	3,855
SAME WEEK YR AGO	2,510	1,460	3,970
TO-DATE/2001	26,395	14,036	40,431
TO-DATE/2000	28,282	15,011	43,293

**CENTRAL REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

**EASTERN REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

**CHICKEN** 23-MAR-2001  
 — PRICES — VOLUME —  
 (Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

**CHICKEN, WITH SKIN ADDED**

— PRICES — VOLUME —  
 (Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	17.00-20.00	16.00	163,200	40,800
WTD AVERAGE	17.50	16.00		
15-20%				
RANGE	15.00-20.00	10.00-13.50	2,361,200	974,000
WTD AVERAGE	16.32	11.62		

20% OR MORE

RANGE	-	-	-	-
WTD AVERAGE				

\* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

**CHICKEN** 23-MAR-2001  
 — PRICES — VOLUME —  
 (Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	21.00	-	240,000	240,000
WTD AVERAGE	21.00			

**CHICKEN, WITH SKIN ADDED**

— PRICES — VOLUME —  
 (Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	17.00-18.00	15.00-17.25	890,000	212,000
WTD AVERAGE	17.27	15.95		
15-20%				
RANGE	12.25-18.00	11.50-15.00	1,828,000	1,028,000
WTD AVERAGE	15.50	13.39		
20% OR MORE				
RANGE	-	11.00	160,000	-
WTD AVERAGE		11.00		

\* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

**NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 23 MARCH 2001.**

Trade sentiment on fresh tom breast meat mixed. Buyer sentiment ranged steady to barely steady while sellers were at least steady. Some buyers noted increased fresh tom breast meat offers this week while a few sellers noted increased inquiry towards the end of the week. The undertone on Grade A 4-8 lb. showed signs of improvement due to better balanced supplies as a result of some inventory clearing transactions. Thigh meat undertone was steady for a light to fair demand. Trade sentiment on mechanically separated turkey (MST) mixed. Some sellers note strength on frozen into export channels while others move fresh into pet foods at 10 cents delivered. Trading centered on moderately heavy volumes of 4-8 lb. breasts for domestic and on tom drums for export, balance light. Fresh wing meat with skin traded at 64 cents delivered domestic. For export: tom necks 28 cents delivered current and hen 2-joint wings 41 cents delivered May.

**FRIDAY, MARCH 23, 2001****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	29.00-31.00		30.01	608	30.00	1,084
WINGS FULL-CUT - TOMS		R	36.50	80	36.50	80
WINGS, V-TYPE, TOM	28.50		28.50	312	28.62	676
TAILS		W	25.00	80	25.00	80
MECHANICALLY SEPARATED 2/	18.00		18.00	208	16.95	632
THIGH MEAT - FROZEN	65.00-65.50		65.36	390	65.03	1,310

**THURSDAY, MARCH 22, 2001****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	29.00-30.00		29.82	224
WINGS FULL-CUT - TOMS	36.00-37.00		36.50	80
WINGS, V-TYPE, TOM	29.00		29.00	260
TAILS		W	25.00	80
MECHANICALLY SEPARATED 2/		W	16.35	372
THIGH MEAT - FROZEN		W	65.00	600

**WEDNESDAY, MARCH 21, 2001****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	30.00-31.00		30.30	172
WINGS FULL-CUT - TOMS		W	30.00	160
WINGS, V-TYPE, TOM		M	28.00	104
TAILS	25.00		25.00	80
MECHANICALLY SEPARATED 2/	16.00-18.50		16.35	372
THIGH MEAT - FROZEN	65.00		65.00	600

**TUESDAY, MARCH 20, 2001****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	29.50		29.50	40
WINGS FULL-CUT - TOMS		W	30.00	160
WINGS, V-TYPE, TOM		M	28.00	104
TAILS		R	26.00	80
MECHANICALLY SEPARATED 2/		M	17.00	52
THIGH MEAT - FROZEN	65.50		65.50	40

**MONDAY, MARCH 19, 2001****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	30.00		30.00	40
WINGS FULL-CUT - TOMS		W	30.00	160
WINGS, V-TYPE, TOM	28.00		28.00	104
TAILS		R	26.00	80
MECHANICALLY SEPARATED 2/	17.00		17.00	52
THIGH MEAT - FROZEN	64.00-66.00		64.57	280

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.

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